

Case Note Types for IFSP

Creating a new Case Note

1. On the Individual Tab, under the Case Note section, select “New”.

To Do	Care	
Individual	T-Log	New Search Archive
Health	Case Note	New Search Archive Bulk PDF
Agency	General Event Reports (GER)	New Search

2. Select the individual you'd like to create a case note for. You'll then see this screen:

New Case Note

You don't have any default Case Note Template selected currently.

Select Date and Template

* Service Date

* Select Template

Enter the date the activity took place and select the type of case note you'd like to create. The drop-down will list the following case notes:

- General
- Home Visit
- Consultation
- Evaluation/Assessment
- IFSP/IFSP Review
- Transition
- Child Outcomes

Case Note Types:

General:

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Time: List in minutes the length of the contact if you would like.
 - c. Activity Type: You may choose from Family Contact Notes, Scheduling, Service Delivery, No-Show, or Other.

Template: General 1.2

Case Note Details

Individual	Mary Active ⓘ
* Service Provider	<input type="text" value="Adusumilli, J / Executive Director"/>
Service Date	12/28/2020
Time Duration (Minutes)	<input type="text"/>
Service & Unit Rate (\$)	<input type="text" value="- Please Select -"/>
* Activity Type	<input type="text" value="- Please Select -"/>
Billable	<input type="radio"/> Yes <input type="radio"/> No
Face to Face	<input type="radio"/> Yes <input type="radio"/> No
Person Contacted	<input type="text" value="- Please Select / Add New -"/> ⓘ

Questionnaire

General 1.2

No Question Answered

Open

2. In the Questionnaire, you will be able to complete the following information:
 - a. Question 1: You may select the type of attempt to communicate from the drop down. Your choices are Email, Text, Phone Call, Letter.
 - b. Question 2: You may select the outcome of the attempt to communicate from the drop down. Your choices are No Response, Cancellation, Successful.
 - c. Question 3: You may enter the attempt number (just a numeral) in this box.

Answer Questionnaire

General 1.2

Filter Reset

1. Type of attempt
[Not Answered]

2. Outcome of attempt.
[Not Answered]

3. Attempt Number
[Not Answered]

1. Type of attempt
Select

Save Save & Next Next

Close Popup

Be sure to select “Save and Next” after each question you answer, and “Close Popup” once you’ve completed the questionnaire.

3. You are able to add an additional attachment or add notes on the main case note screen, if you would like.

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File Scan File

Note

B I U [List Icons] 11pt [List Icons]

Cancel Back Save Submit

Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

Home Visit:

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Time: List in minutes the length of the home visit if you would like.
 - c. Location: You may choose from Home, Child Care, Community or Other. Note: If you select "Other" you will need to answer question #1 in the Questionnaire.

Template: Home Visit 1.2

Case Note Details

Individual	Mary Active ⓘ
* Service Provider	Adusumilli, J / Executive Director ▼
Service Date	12/28/2020
Time Duration (Minutes)	<input type="text"/>
Service & Unit Rate (\$)	- Please Select - ▼
* Location	- Please Select - ▼
Billable	<input type="radio"/> Yes <input type="radio"/> No
Face to Face	<input type="radio"/> Yes <input type="radio"/> No
Person Contacted	- Please Select / Add New - ▼ ⓘ

Questionnaire

Home Visits 1.2

No Question Answered

[Open](#)

2. In the Questionnaire, you will need to list the location of the home visit if you selected Other in the Location drop-down.

The screenshot shows a window titled "Answer Questionnaire" with a sub-header "Home Visits 1.2". On the left, there is a list of questions, with the first one selected: "1. If location is 'Other' use comment..." and a status of "[Not Answered]". Above this list are "Filter" and "Reset" buttons. On the right, the selected question is displayed with a text input field and a "Save" button. At the bottom right of the window, a "Close Popup" button is circled in red.

Be sure to select "Save and Next" after each question you answer, and "Close Popup" once you've completed the questionnaire.

3. You are able to add an attachment or additional notes on the main case note screen.

The screenshot displays the "Attachment(s)" section with a yellow warning box: "The total size of all attachments cannot exceed 10 MB". Below this are "Add File" and "Scan File" buttons. The "Note" section contains a rich text editor with a toolbar (bold, italic, underline, list, indent, font size) and a large text area. At the bottom of the form, there are "Cancel", "Back", "Save", and "Submit" buttons, with the "Submit" button circled in red.

Once you have completed the case note, select "Save" to save your work and continue adding information, or "Submit" to finalize the case note.

Consultation:

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Time: List in minutes the length of the consultation.
 - c. Activity Type: You may choose from OT, PT, ECSE, SLP, Nursing or Social Work consultation.
 - d. Location: You may choose from Home, Child Care, Community or Other. Note: If you choose Other, you will need to complete Question #1 in the Questionnaire

Template: Consultation 1.3

Case Note Details

Individual	Mary Active ⓘ
* Service Provider	<input type="text" value="Adusumilli, J / Executive Director"/>
Service Date	12/28/2020
Time Duration (Minutes)	<input type="text"/>
* Activity Type	<input type="text" value="- Please Select -"/>
* Location	<input type="text" value="- Please Select -"/>
Billable	<input type="radio"/> Yes <input type="radio"/> No
Face to Face	<input type="radio"/> Yes <input type="radio"/> No
Person Contacted	<input type="text" value="- Please Select / Add New -"/> ⓘ

* **Questionnaire**

Consultation 1.2

No Question Answered

Open

2. In the Questionnaire, you will be able to complete the following information:
 - a. Question 1: If you selected Other as the location, complete this question. If not, you can skip it.
 - b. Question 2: You **must** attach your consultation to this question. **(Required)**
 - c. Question 3: You **must** select “yes” or “no” to this question. **(Required)**
 - d. Question 4: You may indicate the outcome to which the consultation is connected.

The screenshot shows a web interface titled "Answer Questionnaire" for "Consultation 1.2". On the left, there is a list of questions, each with a "Not Answered" status. The first question is "1. If 'other' location is checked please describe...". The main area on the right shows the details for this question, including a text input field and three buttons: "Save", "Save & Next", and "Next". At the bottom right of the window, a "Close Popup" button is circled in red.

Be sure to select “Save and Next” after each question you answer, and “Close Popup” once you’ve completed the questionnaire.

3. You are able to add an additional attachment or add notes on the main case note screen, if you would like.

The screenshot shows a web interface for adding attachments and notes. The "Attachment(s)" section includes a warning: "The total size of all attachments cannot exceed 10 MB" and buttons for "Add File" and "Scan File". Below this is the "Note" section, which features a rich text editor with a toolbar (including Bold, Italic, Underline, and text alignment options) and a large text area. At the bottom of the interface, there are buttons for "Cancel", "Back", "Save", and "Submit", with the "Submit" button circled in red.

Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

Evaluation/Assessment:

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Time: List in minutes the length of the evaluation/assessment.
 - c. Location: You may choose from Home, Child Care, Community or Other. Note: If you select "Other" you will need to answer question #1 in the Questionnaire.

Template: Evaluation/Assessment 1.3

Case Note Details

Individual	Jane Active 
* Service Provider	<input type="text" value="Adusumilli, J / Executive Director"/>
Service Date	12/28/2020
* Time Duration (Minutes)	<input type="text"/>
Location	<input type="text" value="- Please Select -"/>
Billable	<input type="radio"/> Yes <input type="radio"/> No
Face to Face	<input type="radio"/> Yes <input type="radio"/> No
Person Contacted	<input type="text" value="- Please Select / Add New -"/> 

*** Questionnaire**

Evaluation/Assessment 1.3

No Question Answered

[Open](#)

2. In the Questionnaire, you will be able to complete the following information:
 - a. Question 1: You will need to list the location of the evaluation/assessment if you selected Other in the Location drop-down.
 - b. Question 2: You **must** select the type of assessment. Your choices are Initial or Annual. **(Required)**
 - c. Question 3: You may select the number of participants present at the evaluation (just a numeral).

The screenshot shows a web-based questionnaire interface. At the top, it says 'Answer Questionnaire' and 'Evaluation/Assessment 1.3'. There are 'Filter' and 'Reset' buttons. The left column lists three questions, all marked as 'Not Answered'. The right column has a text input field for question 1 and three buttons: 'Save', 'Save & Next', and 'Next'. A 'Close Popup' button is circled in red at the bottom right.

3. You are able to add an attachment or additional notes on the main case note screen.

The screenshot shows the 'Attachment(s)' and 'Note' sections of a case note screen. The 'Attachment(s)' section has a yellow warning box stating 'The total size of all attachments cannot exceed 10 MB' and buttons for 'Add File' and 'Scan File'. The 'Note' section has a rich text editor with a toolbar and a large text area. At the bottom, there are 'Cancel', 'Back', 'Save', and 'Submit' buttons, with 'Submit' circled in red.

Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

IFSP/IFSP Review:

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Time: List in minutes the length of the IFSP/IFSP Review Meeting if you would like.
 - c. Activity Type: Select the type of IFSP Meeting completed. You may choose from Transition, Review, Annual or Initial.
 - d. Location: Select the location of the IFSP/IFSP Review Meeting. You may choose from Family Home, Community, Childcare or Other.

Template: IFSP/IFSP Review 1.2

Case Note Details

Individual	Mary Active 
* Service Provider	<input type="text" value="Adusumilli, J / Executive Director"/>
Service Date	12/28/2020
Time Duration (Minutes)	<input type="text"/>
* Activity Type	<input type="text" value="- Please Select -"/>
* Location	<input type="text" value="- Please Select -"/>
Billable	<input type="radio"/> Yes <input type="radio"/> No
Face to Face	<input type="radio"/> Yes <input type="radio"/> No
Person Contacted	<input type="text" value="- Please Select / Add New -"/> 

*** Questionnaire**

IFSP/IFSP Review

No Question Answered

- In the Questionnaire, you may list the number of participants at the IFSP/IFSP Review Meeting.

Answer Questionnaire

IFSP/IFSP Review

Filter Reset

1. Number of participants.

[Not Answered]

Save

Close Popup

- You are able to add an attachment or additional notes on the main case note screen.

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File Scan File

Note

B I U [List Icons] 11pt [List Icons] [Undo] [Redo]

Cancel Back Save Submit

Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

Transition:

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Time: List in minutes the length of the Transition Meeting.
 - c. Activity Type: You may choose from 2.7 Transition or 2.9 Transition.
 - d. Location: You may choose from Home, Child Care, Community or Other.

Template: Transition 1.2

Case Note Details

Individual Mary Active ⓘ

* **Service Provider** Adusumilli, J / Executive Director ▼

Service Date 12/28/2020

* **Time Duration (Minutes)**

* **Activity Type** - Please Select - ▼

* **Location** - Please Select - ▼

Billable Yes No

Face to Face Yes No

Person Contacted - Please Select / Add New - ▼ ⓘ

* **Questionnaire**

Transition 1.2

No Question Answered

[Open](#)

- In the Questionnaire, you **must** list the total number of participants at the 2.7 or 2.9 Transition meeting. **(Required)**

The screenshot shows a web-based questionnaire interface. At the top, it says "Answer Questionnaire" and "Transition 1.2". There are "Filter" and "Reset" buttons. The question is "1. How many participants were there?" with a text input field and a "Save" button. A "Close Popup" button is circled in red at the bottom right.

Be sure to select "Save and Next" after each question you answer, and "Close Popup" once you've completed the questionnaire.

- On the main case note screen, you **must** attach the LEA or Opt-Out Notification form by using the Attachment(s) option. You are also able to add additional notes on this screen. **(Required)**

The screenshot shows a case note interface. It has an "Attachment(s)" section with a warning: "The total size of all attachments cannot exceed 10 MB" and buttons for "Add File" and "Scan File". Below is a "Note" section with a rich text editor toolbar (including Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Font Size, Undo, Redo) and a large text area. At the bottom, there are "Cancel", "Back", "Save", and "Submit" buttons. The "Submit" button is circled in red.

Once you have completed the case note, select "Save" to save your work and continue adding information, or "Submit" to finalize the case note.

Child Outcomes:

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Time: List in minutes the length of the child outcomes assessment if you would like.
 - c. Activity Type: Select the type of AEPS completed. You may choose from Entrance, Annual or Exit.

Template: Child Outcome

Case Note Details

Individual	Mary Active 
* Service Provider	<input type="text" value="Adusumilli, J / Executive Director"/>
Service Date	12/28/2020
Time Duration (Minutes)	<input type="text"/>
* Activity Type	<input type="text" value="- Please Select -"/>
Billable	<input type="radio"/> Yes <input type="radio"/> No
Face to Face	<input type="radio"/> Yes <input type="radio"/> No
Person Contacted	<input type="text" value="- Please Select / Add New -"/> 

* **Questionnaire**

Child Outcome

No Question Answered

[Open](#)

- In the Questionnaire, you **must** indicate if the AEPS Progress Record was reviewed with the family by selecting Yes or No. This will replace the required statement in the IFSP. **(Required)**

Answer Questionnaire

Child Outcome

1. Was the AEPS Progress Record reviewed with the family?*

Yes

No

Save

Close Popup

Be sure to select “Save and Next” after each question you answer, and “Close Popup” once you’ve completed the questionnaire.

- You must attach the AEPS assessment or Progress Record to the Case Note. You may also add additional notes on the main page if you wish.

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File Scan File

Note

B I U [List Icons] 11pt [List Icons]

Cancel Back Save Submit

Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.